



Invoicing & Billing Manual

- ♦ **Purpose** This manual outlines the standard process for managing Bills (payments to electricians) and Invoices (charges to customers) using Pipedrive and QuickBooks.

1. Billing Process (To Electricians)

Step-by-step: Bill Upload (Team member)

Upload Bill

A team member uploads a screenshot or PDF of the bill to the corresponding deal in Pipedrive.

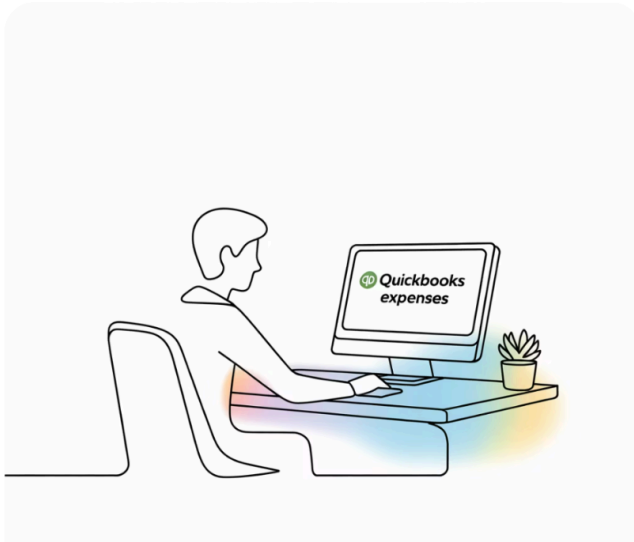
Specify Location

Upload location: Files section of the deal.

Multiple Deals

✓ If one bill covers multiple deals, it is acceptable to upload the full bill to just one deal without splitting it.

Bill Entry & Update (Team member)



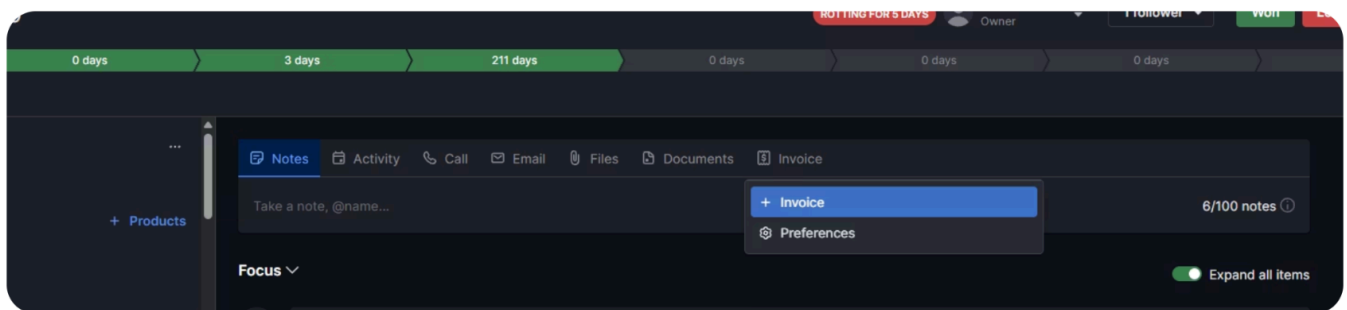
Another team member logs into QuickBooks, navigates to the Expenses section, and locates the corresponding bill.

The bill details are updated accordingly (amount, vendor, etc.).

Once the update is complete, the team member reports the update to the appropriate internal contact.

1. Invoicing Process (To Customers)

Step-by-step: Invoice Creation in Pipedrive



1

In Pipedrive, go to the Invoices tab within a deal.

2

Click Create Invoice.

3

You do not need to list each item individually.

4

Example: If the job was for Electrum, simply write "Electrum" as the description and enter the total amount.

Automatic QuickBooks Sync

<input type="checkbox"/>	7/28/25	291104	Electrum	\$850.00	Due in 6 days
<input type="checkbox"/>	7/28/25	293131	Electrum	\$1,670.00	Due in 6 days
<input type="checkbox"/>	7/28/25	296422	Electrum	\$1,870.00	Due in 6 days
<input type="checkbox"/>	7/28/25	278720	Electrum	\$1,165.00	Due in 6 days
<input type="checkbox"/>	7/28/25	292607	Electrum	\$1,350.00	Due in 6 days
<input type="checkbox"/>	7/28/25	295627	Electrum	\$1,350.00	Due in 6 days
<input type="checkbox"/>	7/28/25	293371	Electrum	\$2,310.00	Due in 6 days
<input type="checkbox"/>	7/28/25	295420	Electrum	\$1,980.00	Due in 6 days
<input type="checkbox"/>	7/29/25	294954	Electrum	\$1,350.00	Due in 7 days
<input type="checkbox"/>	7/29/25	295937	Electrum	\$1,350.00	Due in 7 days

Opened
7/28/2025

☐ Sent

☐ Viewed

☐ Paid

☐ Deposited

Products and services >

More actions

Edit invoice

Once the invoice is created in Pipedrive, it is automatically synced to QuickBooks.



Invoices created in Pipedrive cannot be edited later.

If edits are required, they must be made directly in QuickBooks.



Notes



Clear Labeling

Make sure all uploaded files are clearly labeled and legible.



Communication

Maintain communication between team members to ensure accuracy and timely updates.



Verification

Always verify that the amounts match between the uploaded file and the data in QuickBooks.